

Lesson 2 - The Investigation process

In this lesson you'll use the Investigation Summary form to record:

- ❖ the reason for opening an investigation
- ❖ the animal owner id and location
- ❖ the premises id and location
- ❖ the person responsible for the investigation

You'll also use the Herd Exam form to record:

- ❖ the identity of the diagnostician examining the herd, clinical history, clinical signs, lesions seen, diagnostician's clinical diagnosis and certainty of a foreign or emerging disease.

You'll also use the Specimen Submission form to record:

- ❖ the submitter, animal owner, method shipped, lab sent to, reason for submission, animal numbers and other summary information

You'll also use the Sample Detail form to record:

- ❖ whether individual or groups of samples are submitted, the sample id number and type

The People involved in the work of investigating premises, appraising, removing animals and materials, and cleaning up (investigators, field personel and support staff) are the primary users of the Investigation module. The Investigation Summary form is used to open all new investigations and initiate all response actions. It's helpful to think of the Investigation Summary form as the *Parent* form. All other forms accessed from the Investigation Summary (such as the Herd Exam form) are *Child* or *Grandchildren* forms.

Step 1

When the Investigation Summary Form is first accessed, the form will have a *PENDING* status. The field for marking the investigation as public or private has a drop down box. Click on the down arrow and make the appropriate selection as shown below.

The screenshot shows the 'Investigation Summary' form in a Microsoft Internet Explorer browser window. The address bar displays 'https://data01.aphis.usda.gov/EMRSInves.nsf'. The page header includes the USDA logo and the text 'Animal and Plant Health Inspection Service' and 'Emergency Management Response System'. The form is titled 'INVESTIGATION SUMMARY' and contains the following fields:

- REFERRAL CONTROL NUMBER
- PREMISES NAME/OWNER
- FORM STATUS: **PENDING**
- Field for marking what EMRS group can view document: A dropdown menu is open, showing the following options: GENERAL, EMRS Development, EMRS Alabama, EMRS Arizona, and EMRS Arkansas.

At the bottom of the form, there is a section for 'Visit Reasons' with a dropdown menu for 'Initiation reason *'. The status bar at the bottom of the browser window shows 'Done' and 'Internet'.

Step 2

Select the appropriate initiation reason from the drop down box. Options are **complaint**, **trace**, **vaccination** or **surveillance**. Enter details corresponding to the initiation in the space provided.

https://data01.aphis.usda.gov/EMRSInves.nsf - Microsoft Internet Explorer

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Address https://data01.aphis.usda.gov/EMRSInves.nsf Go Links >>

Veterinary Services
Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view
View Categories
GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

REFERRAL CONTROL NUMBER
PREMISES NAME/OWNER
FORM STATUS
Field for marking what EMRS group can view document

PENDING
GENERAL

Visit Reasons

Initiation reason *
Reason details
Owner Information
Premises ID NR
Operation Type *
Last Name *
First Name

Complaint
Trace
Vaccination
Surveillance

Done Internet

Step 3

The Premises ID is a local Generic Data Base, state, or national number used to identify the premises. Data entry is optional, but the id is important in linking this investigation to other information. Use the drop down box to select the Type of Operation as shown below.

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER

PREMISES NAME/OWNER

FORM STATUS

Field for marking Public or Private

Visit Reasons

Initiation reason *

Reason details *

Owner Information

Premises ID NR

Operation Type *

Last Name *

Beef Breeder

Cow/Calf

Dairy

Dealer

Equine Breeder

Farm

Farrow-to-finish

Feeder Pig Finisher

Feedlot

Game Farm

Garbage Feeder

Livestock Market

Other

Pet Store

Poultry Breeder

Poultry Broiler

Poultry Layer

Poultry Multiplier

Ranch

Residence

PENDING

****PUBLIC****

visit

First Name

Middle Initial

Step 4

Continue to enter information about the premises. Data entry is required in fields with names appearing in bold type. After entering the State Code, click on the icon shown below to access a list of the state's counties.



Continue

Step 5

After completing data entry, press the **SAVE** button. A Contact Summary will display showing the referral control number assigned to this investigation.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Animal and Plant Health Inspection Service
Safeguarding Animal Health
Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

EDIT NEW INVESTIGATION SUMMARY FOLLOW-UP FORMS MAP MAIL IT HELP

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER 20212084431G
PREMISES NAME/OWNER SMITH, JOHN Q
FORM STATUS ASSIGNED
Field for marking what EMRS group can view document ****GENERAL****

Contact Summary Assignments and Forms Disposition and Controls Distribution & Changes All Sections

Visit Reasons

Initiation reason * Complaint
Complaint Source * Practitioner

Step 6

Click on the **Follow-up Forms** button to access a list of “child” forms linked to the Investigation Summary. The forms will be listed in the most probable order of use. Select the **Herd Exam** form.

The Herd Exam form records the identity of the diagnostician examining the herd. It also documents clinical history, clinical signs and lesions seen. The diagnostician’s clinical diagnosis and certainty of a foreign or emerging disease are also recorded.

Initial Investigation Mapping - Netscape

Select Response Form Below

[Herd Exam Form](#)
[Specimen Submission Form](#)
[Traces](#)
[Questionnaire](#)
[Appraisal Assignment Form](#)
[Euthanasia and Disposal Summary](#)
[Cleaning And Disinfection](#)
[Vector Control Worksheet](#)
[Vaccination Record](#)

Step 7

Enter the information requested in the Herd Exam form shown below.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Address https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf Go Links >>

Veterinary Services
Animal and Plant Health Inspection Service
Safeguarding Animal Health

Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

REFERRAL CONTROL NUMBER 20212084431G
PREMISES NAME/OWNER SMITH, JOHN Q
STATUS ASSIGNED

Herd Examination Info Distribution & Changes All Sections

Investigator Contact Information

Reasons Initial

Assigned Investigator* Archer, Brian Lookup Clear

Date Assigned* 02/12/2002

Work Phone 605-224-0579 Pager

Fax 605-224-8451 Home Phone 605-224-0579

Cell Phone 605-222-3624 E-Mail brian.c.archer@usda.gov

Exam Summary

Exam Date* Exam Time

Clinical History

Done Internet

Step 8

Click on the Lookup icon next to the Assigned Investigator field to access a list of EMRS contacts as shown below.

Employee Database Lookup - Netscape

EMRS Contacts List

| Name | Title | Org | City | St | Zip |
|-----------------------------------|-----------------|-----------------------|----------|----|-------|
| Belfrage, John | Staff | CEAH | | CO | |
| Boghossian, Aida | | | | | |
| Carr, Robert | Admin | CEAH | Loveland | CO | 80539 |
| Cary, Sue | Tech Specialist | usda, aphis, vs, ceah | | | |
| Cleveland, Gordon | | | | | |
| Edward, Jim | | | | | |
| Grant, Eric | | | | | |

Step 9

Click on the clock icon next to any date field to access a calendar as shown below. After clicking on the appropriate date, the date will automatically be entered in the field.



Step 10

You will have to scroll down to access all sections of the Herd Exam form. When entering information in the Physical or Necropsy Exam sections, click on the Question Mark icon to receive an explanation of the type of information requested. Press the **SAVE** button when data entry is complete.

USDA Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view
Investigation Summary View Categories
Inv Summaries by Creation Date GO Choice

| | Species | # Sick * | # Dead * | Number Unaffected | Total |
|----------------------------|---|----------|----------|-------------------|-------|
| Primary Species * | Porcine (Hogs) | | | | 0 |
| Second Susceptible Species | | | | | 0 |
| Other Susceptible Species | Avian (Birds) Bison Bovine (Cattle) | | | | 0 |
| Total Number in Herd | 0 | | | | |

Physical Exam

| Category | Normal? | Comments |
|--------------------|---------|----------|
| General | No Exam | |
| Skin | No Exam | |
| Head Area | No Exam | |
| Respiratory | No Exam | |
| Cardio - vascular | No Exam | |
| Abdomen Digestive | No Exam | |
| Urogenital | No Exam | |
| Musculo - skeletal | No Exam | |

Step 11

Click on the **View Inv Summary** button to return to the “parent” Investigation Summary document. Click on the **Followup Forms** button. Select the Specimen Submission Form from the list provided.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Veterinary Services
Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

EDIT NEW INV SUMMARY NEW HERD EXAM **VIEW INV SUMMARY** MAP MAIL IT HELP

HERD EXAM FORM

REFERRAL CONTROL NUMBER 20205125920H
PREMISES NAME/OWNER HORSE E OWNER
STATUS COMPLETED

Herd Examination Info Distribution & Changes All Sections

Investigator Contact Information

Reasons Initial
Assigned Investigator* Archer, Brian

Done Internet

Step 12

Enter information requested in the Specimen Submission form shown below. Press the **SAVE** button when data entry is complete.

The screenshot shows a web browser window titled "https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer". The address bar shows the URL "https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf". The page header includes the USDA logo and the text "Veterinary Services", "Animal and Plant Health Inspection Service", and "Emergency Management Response System". A navigation bar contains links for "INVESTIGATIONS", "ADMINISTRATION", "TASKS", and "OFFLINE SERVICES". A "Choose a view" section has a dropdown menu set to "Incident Management" and a "View Categories" link. Below this, there is a "Inv Summaries by Creation Date" dropdown and a "GO Choice" button. A "SAVE" button is located on the left side of the form. The main section is titled "SPECIMEN SUBMISSION FORM". It contains the following information: REFERRAL CONTROL NUMBER: 20212084431G, PREMISES NAME/OWNER: SMITH, JOHN Q, STATUS: PENDING. The "Submitter Information" section includes a "Purpose of Submission" dropdown, a "Submitter" dropdown set to "Tesar, Lynn", and a "Lookup" button. Below these are fields for "Address:", "Address2:", "City:", "State:", and "County:". To the right of these fields are fields for "Submitter Work Phone:" (605-224-6186), "Submitter Fax:" (605-224-8451), "Submitter Cell Phone:", "Submitter Pager:", and "Submitter Home Phone:". The browser status bar at the bottom shows "Done" and "Internet".

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Address https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf Go Links >>

Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

SAVE

SPECIMEN SUBMISSION FORM

REFERRAL CONTROL NUMBER 20212084431G
PREMISES NAME/OWNER SMITH, JOHN Q
STATUS PENDING

Submitter Information

Purpose of Submission

Submitter Tesar, Lynn Lookup X Clear

Address: Submitter Work Phone: 605-224-6186

Address2: Submitter Fax: 605-224-8451

City: Submitter Cell Phone:

State: Submitter Pager:

County: Submitter Home Phone:

Done Internet

Step 13

When a summary of the information entered in the Specimen Submission form appears, click on the **Create Sample** button as shown below.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Veterinary Services
Animal and Plant Health Inspection Service
Safeguarding Animal Health
Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

EDIT Create Sample Create Lab Report MAIL IT View Source Investigation HELP

SPECIMEN SUBMISSION FORM

REFERRAL CONTROL NUMBER 20205125920H
PREMISES NAME/OWNER HORSE E OWNER
STATUS ASSIGNED

Submission Information Samples & Lab Test Reports Distribution & Changes All Sections

Submitter Information

Purpose of Submission FAD/EP Diagnostic
Submitter Archer, Brian
Address: 501 North Spruce Submitter Work Phone: 605-224-0579
Address2: Submitter Fax: 605-224-0454

Done Internet

Step 14

Press the **SAVE** button when data entry in the Sample form shown below is complete.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Address https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf Go Links >>

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

SAVE

SAMPLE

REFERRAL CONTROL NUMBER 20205125920H
PREMISES NAME/OWNER HORSE E OWNER

Sample Info

Species * Breed *
Sample ID *
Sample Quantity * Sample Type *
Animal ID (single or range) Age

Done Internet

Step 15

Click on the **View Source Investigation** button to return to the “child” Specimen Submission document. Click on the **View Source Investigation** button to return to the “parent” Investigation Summary document.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Address https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf Go Links >>

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

EDIT **Create Sample** **Create Lab Report** **MAIL IT** **View Source Investigation** **HELP**

SPECIMEN SUBMISSION FORM

REFERRAL CONTROL NUMBER 20205125920H
PREMISES NAME/OWNER HORSE E OWNER
STATUS ASSIGNED

Submission Information Samples & Lab Test Reports Distribution & Changes All Sections

Submitter Information
Purpose of Submission FAD/EP Diagnostic
Submitter Archer, Brian
Address: 501 North Spruce Submitter Work Phone: 605-224-0579

Done Internet

Step 16

Click on the **Assignments and Forms** tab to access Assignments and Forms Investigation Summary shown below.

Click on the **EDIT** button.

Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS **ADMINISTRATION** **TASKS** **OFFLINE SERVICES**

Contact Summary **Assignments and Forms** **Disposition and Controls** **Distribution & Changes** **All Sections**

Investigation Coordinator

Assignment Officer*

Date Assigned *

Work Phone Pager
Fax Home Phone
Cell Phone E-Mail

Follow-up Forms

| Form | Create Date | Status | Assignee |
|-------------------------------------|-------------|-------------|---------------|
| Herd Examination | 02/05/2002 | ✓ COMPLETED | Archer, Brian |
| Herd Examination | 02/05/2002 | ✓ COMPLETED | Archer, Brian |
| Trace Summary | 02/05/2002 | ● ASSIGNED | Hanson, Craig |
| Specimen Submission | 02/05/2002 | ● ASSIGNED | Archer, Brian |
| Trace Summary | 02/05/2002 | ● ASSIGNED | Archer, Brian |

Step 17

Click on the Lookup icon next to the Assignment Officer field of the Investigation Coordinator section to access a list of EMRS contacts. The investigation coordinator must be an Area Veterinarian in Charge, a READEO Section Head or a Disease Reporting Officer. Press the SAVE button when data entry is complete.

https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf - Microsoft Internet Explorer

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Address https://data01.aphis.usda.gov/EMRS/Training/EMRSInves.nsf Go Links >>

Emergency Management Response System

Choose a view
Incident Management View Categories
Inv Summaries by Creation Date GO Choice

INVESTIGATIONS ADMINISTRATION TASKS OFFLINE SERVICES

SAVE MAIL IT HELP

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER 20205125920H
PREMISES NAME/OWNER HORSE E OWNER
FORM STATUS PENDING
Field for marking what EMRS group can view document GENERAL

Contact Summary **Assignments and Forms** Disposition and Controls Distribution & Changes All Sections

Investigation Coordinator

Assignment Officer* [text box] Lookup X Clear

Date Assigned * [text box]

Work Phone [text box] Pager [text box]

Internet